

To perform Account Management tasks:

1. Enter the same Login Name and Password provided for reporting records
2. Change the Application drop-down menu selection from “Main” to “Administration”
3. Go to User Administration Tab

Towards bottom of screen click on “Add User”

The screenshot displays a web form for adding a new user, divided into two main sections: 'Login Credentials' and 'Contact Information'.

**Login Credentials Section:**

- Login Name: Text input field.
- Password: Text input field.
- Confirm Password: Text input field.
- Authentication: Dropdown menu with 'Password' selected.
- Force Password Change: Unchecked checkbox.
- Status: Dropdown menu with 'Active' selected.
- Type: Dropdown menu with 'Internal' selected.

**Contact Information Section:**

- First Name: Text input field.
- Middle Name: Text input field.
- Last Name: Text input field.
- Title: Text input field.
- Gender: Dropdown menu.
- Email: Text input field.
- Secondary Email: Text input field.
- Supervisor: Dropdown menu.
- Street 1: Text input field.
- Street 2: Text input field.
- City: Text input field.
- State: Dropdown menu with 'TX' selected.
- Zip Code: Text input field.
- Country: Dropdown menu with 'USA' selected.
- Home Phone: Text input field.
- Work Phone: Text input field.
- Mobile Phone: Text input field.
- Pager: Text input field.
- Fax: Text input field.
- Notes: Text area with up/down arrow controls.

4. Fill in Log In Credentials:

Login name: first two initials of the first name and all of last name  
All lowercase

Password: 8-14 characters in length, one number and one symbol

(e.g. \*,&,#, \$, etc.) and one character that is uppercase

\* Check the box to “Force Password Change” which means the first time the new user logs into the system, they will be asked to change their password.

\* Please make sure every password you create for a new user is ‘unique’, please do not use the same password over and over each time you add a new user.

Fill in contact information: use the person’s work email address. All email addresses should contain the first and last name of the person.

## 5. Select Roles and Groups:

### Roles:

Each new user will be assigned two roles:

Entity Records –TRIS User

Patient Records – TRIS User

Click on the SAVE button.

## Add User

**Please correct the indicated errors before proceeding:**

Username can not be blank

First name can not be blank

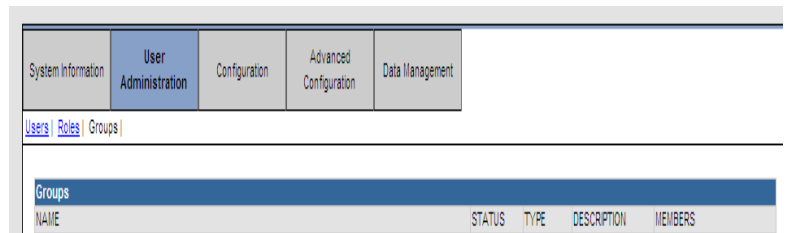
Last name can not be blank

Password can not be blank

Active users must have at least one enabled role

## 6. Look at top of screen to see if there are any errors:

Correct errors and SAVE again.

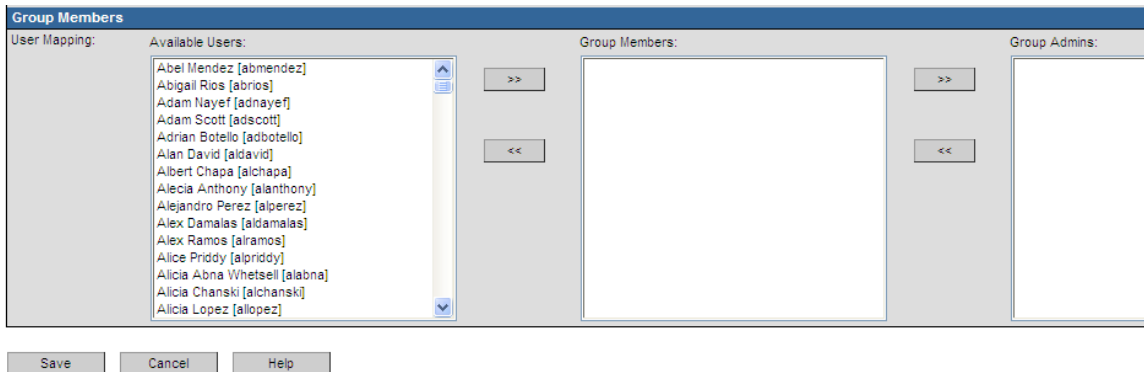


7. Go to Tab for User Administration

Select Groups by clicking on the hyper link (right under large tabs are small hyper links called Users, Roles and Groups)

Click the name of the Group you are adding the user to

Click on the EDIT GROUP button below the Group table.



8. Scroll down past the Group Definition section and go to the Group Members Section.

Choose the user you created from the list by clicking on their name.

Click on the arrow button that moves their name into the “Group Members” box.

Click on Save to add the user to your Group.

If you are creating an account manager, then after you click on the button that places them into the Group Members box, then click on the next arrow to put their name into the Group Admins box.

Click Save.

The new user may now login to the system.